

AGENDA ITEM: Access Services: Multitype Pilot Loan Programs

GENERAL OVERALL PROGRAM UPDATES:

Interlibrary Loan Pilot Program:

Exhibit A contains a summary of the first through fourth quarter (July 2001-June 2002) 2001/02 statistics for the interlibrary loan pilot program. Exhibit B contains fourth quarter transactions (April-June 2002) for the pilot program.

Based on actual transactions for the 2001/02 fiscal year and the reimbursement rate as adopted by the Board and approved by the State Department of Finance, the non-prorated cost of the LoC Interlibrary Loan compensation program totaled \$730,714.

The 2001/02 LoC budget for the ILL pilot program is \$462,000. An additional \$1,266 in LoC unexpended funds was added to the budget bringing the total to \$463,266, which is \$267,448 short of the total cost of the program. Final payments to reimburse all participants at 63.4% of the total cost are currently being processed.

Included as Exhibit C is a summary of the ILL pilot program statistics for FY 2001/02 sorted by the number of loans to nonpublic libraries.

Handling/Delivery Cost Study:

Staff is in the process of issuing a Request For Proposal (RFP) to determining the handling and delivery costs of interlibrary loans and the handling costs of direct loans among member institutions of the Library of California. The four phases to the project are:

Phase I: Design the cost study to determine handling and delivery costs of interlibrary loan and handling costs of direct loan

Deliverable Products:	Bibliography and archive Outline of final report Questions to be addressed in collecting data Data collection methodology
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Phase II: Implement the cost study and report findings

Deliverable Products:	Draft report of cost study results Final report of cost study results
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Phase III: Develop loan compensation policy recommendations

Deliverable Products: First draft report of policy options
 Second draft report of policy options
 Final report of policy options
 Presentation to the Library of California Board

Phase IV: Calculation of compensation formula

Deliverable Product: Formula for reimbursement for handling and delivery
 costs of interlibrary loan and handling costs of direct
 loan, to be used in subsequent rulemaking.

RELATED ISSUE TO COME BEFORE THE BOARD IN THE FUTURE: What
funding formulas are appropriate for the loan components of Library of California
access services?

Relevant Committee: Access Services
Staff Liaison: Sandy Habbestad